

Self Service – Travel Claim Workflow setup.

Disclaimer:

The Knowledge Base is our platform to share information with our customers and provide you with a 'help me, help myself' environment. The guides and documents provide step by step solutions to assist you with your queries based on the acquisition of solutions from previous enquiries.



Important Note

- The information contained in these articles should be treated as guidelines.
- Some articles are **software** version and build specific.
- Articles may not be applicable to all environments.
- If the proposed solution is not successful, please post your comments below or contact the Sage Pastel Payroll and HR Department directly on (011) 304 4300 or support.pastelpayroll@sage.com.

Product Guide

Question:

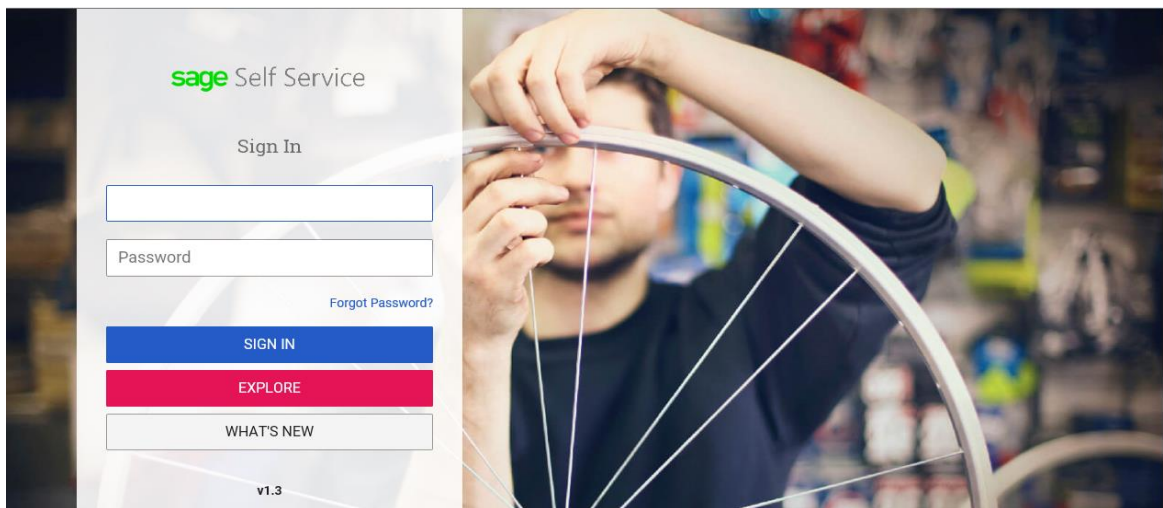
How do I setup the Travel Workflow on Sage HR & Payroll Self Service?

Solution:

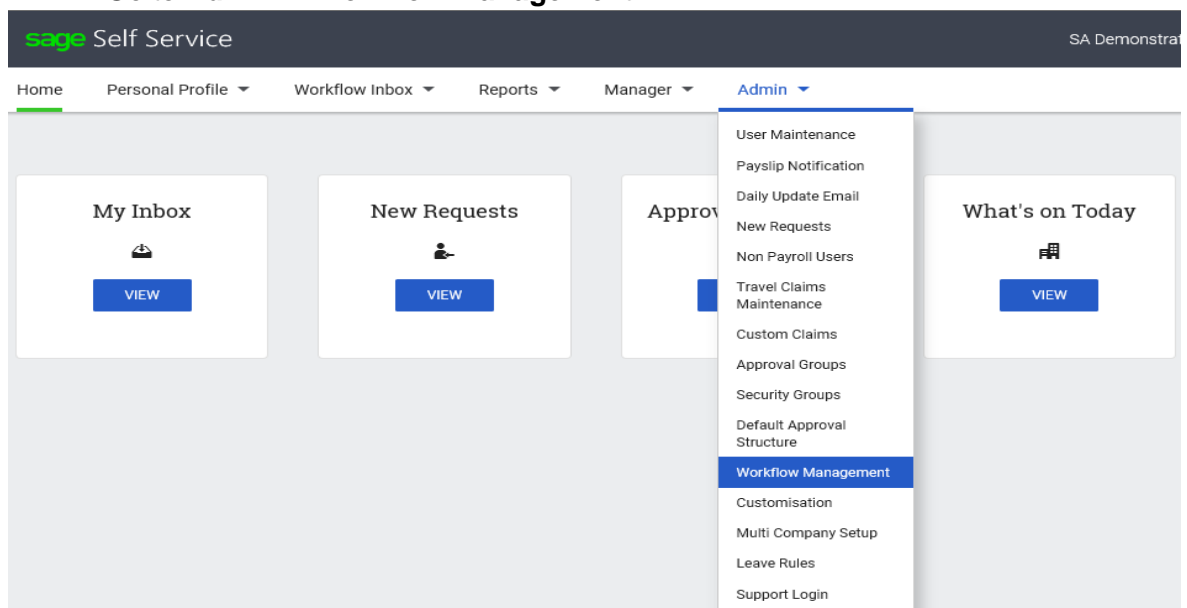
Note: Any document (leave application etc.) will follow the org chart as the default workflow for that document. You are, however, able to set up custom workflows should you wish to have a different workflow for a document from that of the company's org chart.

A custom workflow works similar to the Org Chart. The setup is similar except for the fact that a custom workflow has a name and description and can be linked to specific documents.

1. Please log in to the Website <https://ess.sagesouthafrica.co.za> and enter in the administrators **Username** and **Password**.




2. Go to **Admin....Workflow Management**.



3. Select on **Add Workflow** to add in a custom workflow.

Workflow Management

 [ADD](#)

Workflow Groups

Show entries Search:

Workflow Name	Workflow Description	Document Type	Company	Active	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Select the **Activate** to use this workflow. Enter in the **Workflow Name** and **Workflow Description**, and select the **Modify Associated Documents** as the Travel Claim document.

Workflow Properties

Active YES NO

Workflow Name

Workflow Description

Associated Documents [MODIFY ASSOCIATED DOCUMENTS](#)

5. Select on **Administrator** to give it focus and then select the **employee** that needs to be placed at the top of the diagram (For instance: the Managing Director of the company). Drag the employees under the Administrator till it creates a green tick and drop the employees in the workflow.

Unassigned Employees / Approval Groups

Unassigned Employees Approval Groups

(2 of 9 selected) Search

<input type="checkbox"/>	Employee Name	Employee Code	Company
<input checked="" type="checkbox"/>	John	001	SA Demonstrations Company
<input type="checkbox"/>	Sandy	002	SA Demonstrations Company
<input type="checkbox"/>	Vusi	004	SA Demonstrations Company
<input type="checkbox"/>	Eric	005	SA Demonstrations Company
<input checked="" type="checkbox"/>	Thembi	006	SA Demonstrations Company

Workflow Structure

[COPY DEFAULT APPROVAL STRUCTURE](#) [CLEAR](#)

Administrator

6. Select on the **first person's name** and drag and drop the selected employee's underneath your selected person.

Unassigned Employees / Approval Groups

Unassigned Employees Approval Groups

(2 of 7 selected) Search

<input type="checkbox"/>	Employee Name	Employee Code	Company
<input checked="" type="checkbox"/>	Sandy	002	SA Demonstrations Company
<input checked="" type="checkbox"/>	Vusi	004	SA Demonstrations Company

Workflow Structure

[COPY DEFAULT APPROVAL STRUCTURE](#) [CLEAR](#)

Administrator

- John Brown
- Thembi Ramolefe

Unassigned Employees / Approval Groups

Unassigned Employees
Approval Groups

(0 of 5 selected) Search

<input type="checkbox"/>	Employee Name	Employee Code	Company
<input type="checkbox"/>	Eric	005	SA Demonstrations Company
<input type="checkbox"/>

Workflow Structure

COPY DEFAULT APPROVAL STRUCTURE
CLEAR

- ▾ Administrator
 - ▾ John Brown
 - 👤 Sandy Smith
 - 👤 Vusi Tshabalala
 - 👤 Thembi Ramolefe

7. Once all the information is entered for the custom workflow, select **Save**

Workflow Management

➔
CANCEL
SAVE

Workflow Properties

Active YES NO

Workflow Name

Workflow Description

Associated Documents TravelForm

MODIFY ASSOCIATED DOCUMENTS

Unassigned Employees / Approval Groups

Unassigned Employees
Approval Groups

(0 of 5 selected) Search

Workflow Structure

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- ▾ Administrator
 - ▾ John Brown